

ROE NEWS

SPECIAL EDITION

NOVEMBER 2019

A SUMMARY OF WHAT WE HAVE BEEN UP TO

*Transitioning Licensee
from Financial Wisdom to
Advice Evolution*

*Advice Evolution is a non
institutionally owned
licensee.*



HELLO SPRING

ROE
FINANCIAL

Looking after you

You may have heard that this Financial Year came with a new chapter for Roe Financial. After more than 33 years of business with Financial Wisdom as our licensing partner, we decided to make the transition to Advice Evolution.

We are happy to announce that this transition is complete and we are now authorised representatives of Advice Evolution Pty Ltd.

This was a fortuitous decision as Financial Wisdom have since published that they will cease trading on 30 June 2020.

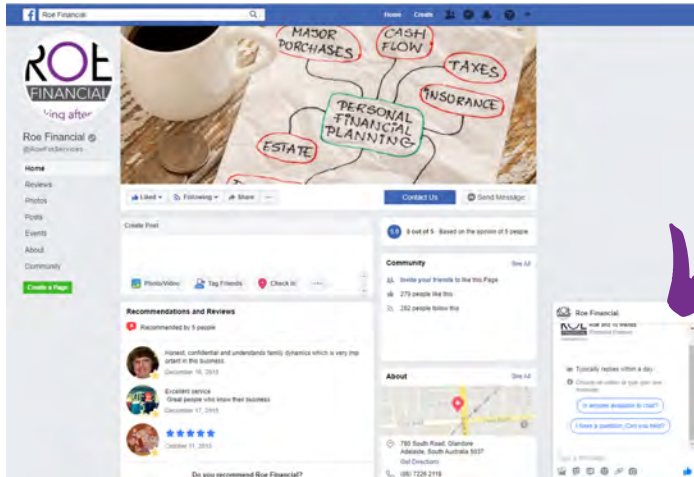
On the surface, it is business as usual. However, you may notice that we are making a few changes to improve your experience with financial advice and the guidance we can now provide. We are very excited about this change and look forward to expanding our range of services and enhancing the way we work with you.



DID YOU KNOW THAT YOU CAN FIND US ON FACEBOOK.

<https://www.facebook.com/RoeFinServices/>

Follow our ROE FINANCIAL Facebook page to keep up to date with the industry and what we are up to in the office. You can also contact us via our live chat window located at the bottom right side of the screen.



A FEW IMPORTANT UPDATES

Financial Services Guide and Privacy Statement

The transition to our new licensee, Advice Evolution, brings a few changes to our Financial Services Guide and Privacy Statement. These important documents are located on our website and can be downloaded using the following links:

FINANCIAL SERVICES GUIDE (FSG)

<https://roefinancial.com.au/financial-services-guide/>

PRIVACY STATEMENT

<https://roefinancial.com.au/privacy-policy/>

If you do not have access to view the following links, and would like a copy of these documents, please contact us and we will send a copy to you in the post.



CLIENT RECIPE

Miriam Glazbrook's Irish Apple Cake

- 1/2 lb Self Raising Flour
- 4 ozs Sugar
- 4 ozs Margarine
- 3-4 Cooking Apples - slice into mixture

Add 1 egg and milk to stiff batter
Bake in greased tin in moderate oven
for approximately 1 hour

ROE TEAM NEWS

A new member joins us in 2019

You may have noticed that one of our team members, Jenna, has been out of the office for a few months. We would like to announce that Jenna and her husband, Kiefer, welcomed a baby girl earlier in the year.

Mali Alessia

Born on the 11th of February 2019.

Jenna has now joined us back in the office 2 days a week.



We farewell Kelly

We would like to announce the departure of Kelly West, who you may have met and / or spoken with over the past 4 years. Kelly was offered an opportunity to further her career and we wish her all the best for her future.

We sincerely thank Kelly for her hard work and dedication throughout her time at Roe Financial as well as being an integral member of our team.

THE TEAM AT ROE FINANCIAL



ANTHONY ROE

Financial Planner

Anthony has been advising since 2003 and as well as Financial Planning, is qualified and passionate in areas of accounting, real estate and small business. Anthony enjoys providing clients with clarity and peace of mind about their future and supporting them through each stage of their life.



STUART ROE

Financial Planner

Since 2003, Stuart has worked with clients to help them understand the complexities which are getting in the way of achieving their goals and dreams. Stuart provides clients with a clear path and the support they need to remove their financial worries and live the life they want.



TIM LINDSAY

Financial Planner

As a Financial Adviser, Tim has guided many clients to financial freedom by helping them to 'manage and make smart decisions about money'. Tim's approach is always to add value to clients and to be working in their best interests.



TOM CURTIS

Financial Planner

Coming from a family business background, Tom knows the importance of planning and focusing on what is important. Tom brings this mentality to his clients by providing clarity around their journey to meet their life and work goals.



JENNA ZOHAR

Strategy Analyst

Jenna has a passion for helping clients to better understand their cash flow position, allowing them to get ahead and make an impact on their day to day finances. Jenna also works closely with advisers to assist clients in achieving their personal and financial goals.



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